



## Morro Bay Tourism Business Improvement District (MBTBID)

### Funding Request – Application Checklist

Please submit all information requested. Incomplete applications will not be reviewed. Applicants must be present at the March TBID Meeting (second Thursday of the month, beginning at 9:00 a.m. at the Veteran's Memorial Building) for consideration.

Questions, please contact [Grants@seemorrobbay.org](mailto:Grants@seemorrobbay.org)

Applicant Name \_\_\_\_\_

Event Name \_\_\_\_\_

Date of Event \_\_\_\_\_

Date Application Submitted \_\_\_\_\_

Applications are reviewed annually by the MBTBID Board. All applications are due by February 28<sup>th</sup> in the City Clerk's office. Please submit eight copies and one electronic copy.

#### **Have you enclosed?**

1. Event Promotion Request Form
2. Budget
3. Proof of room blocks with hotels/motels
4. Supporting documentation
5. Application Checklist
6. Eight Copies and one electronic Copy of the application:

#### **Please Initial**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

#### **Following the Event**

1. Post Event Form must be submitted within 60 days of your event

**By February 28<sup>th</sup>, mail or deliver your completed application to:**

**Morro Bay Tourism Business Improvement District (MBTBID)  
City Clerk's Office, City of Morro Bay  
595 Harbor Street  
Morro Bay, CA 93442**

*The primary purpose of the MBTBID is to increase occupancy and room nights across all lodging types (motel, hotel, bed and breakfast) that pay the business improvement assessment along with transient occupancy tax (TOT) within the City while placing a particular emphasis on marketing that positively impacts the lodging.*



## Morro Bay Tourism Business Improvement District (MBTBID)

### Funding Request – Application Form

Event/Organization Name: \_\_\_\_\_ Address/Zip: \_\_\_\_\_  
Applicant/Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Cell: \_\_\_\_\_  
Applicant/Contact E-mail Address: \_\_\_\_\_ Event Date(s): \_\_\_\_\_ Funds Requested:\$ \_\_\_\_\_

#### **Organization Demographics:**

# of Full-Time staff: \_\_\_\_\_ # of Part-Time staff: \_\_\_\_\_ # of Volunteers: \_\_\_\_\_  
Year Organization was Formed/Incorporated: \_\_\_\_\_ Fed Tax ID#/SS # \_\_\_\_\_  
Has the Organization received MBTBID funds in the past? Yes \_\_\_\_\_ No \_\_\_\_\_ When? \_\_\_\_\_  
Please list the names and titles of your board members. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### **Description of Event:**

Please provide a brief description of the event. Please attach schedules, photos or brochures or any additional information sheets as needed. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### **Collaboration Efforts:**

If the event you are seeking funding for is in collaboration with other agencies please list those agencies and give a description of their relationship, support (including monetary) or participation at the event. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**TOTAL PROJECTED EVENT COST:** \$ \_\_\_\_\_  
**TOTAL REQUESTED FUNDS:** \$ \_\_\_\_\_  
**REQUEST AS A % OF TOTAL PROJECTED COST:** \$ \_\_\_\_\_



## Morro Bay Tourism Business Improvement District (MBTBID)

### Funding Request – Application From Continued

**Total Expected Revenue from Event:** (Please provide additional sheets if necessary) \$ \_\_\_\_\_

Description or Sources for revenue:

\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

**Total Expenditures:** (Please attach additional sheets if necessary) \$ \_\_\_\_\_

Description of expenditures: (Media, print, web, T.V., radio)

\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

#### **Projected Tourism Benefit:**

Expected number of Participants or Spectators? \_\_\_\_\_

Expected number of out of town participants or spectators? \_\_\_\_\_

Expected number of Out-of-Town participants traveling more than 50 miles? \_\_\_\_\_

Expected number of room nights generated? \_\_\_\_\_

Please explain how your organization will collect and verify the above information. (Surveys, registrations, hotel rooms, etc). \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please provide an outline of the marketing plan for the event to be funded by the MBTBID. Please attach additional sheets if necessary. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I attest that the information provided in the Event Funding Request is true, complete and accurate. I further agree that if my application is approved by the MBTBID that I will provide the "Post Event Report" in compliance with the application reporting requirements **within 60 days** after the event. Should I furnish any false information in this application, I hereby agree that such act shall constitute denial, suspension or revocation of my application.

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**For MBTBID Use Only:** **Date Approved/Denied:** \_\_\_\_\_ **VOTE: Yes:** \_\_\_\_\_ **No:** \_\_\_\_\_



## Morro Bay Tourism Business Improvement District (MBTBID)

### Post Event Form

Event Name \_\_\_\_\_ Organization Name \_\_\_\_\_ Event Date \_\_\_\_\_

Address/Zip: \_\_\_\_\_ Phone: \_\_\_\_\_ Web Site: \_\_\_\_\_

Contact Person Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

Funds Allocated \$ \_\_\_\_\_ Total Event Expenditures \_\_\_\_\_ Total Event Revenue \_\_\_\_\_

Total Attendance: \_\_\_\_\_ # of Local Attendees: \_\_\_\_\_ Out of Town Attendees (> 50 Miles): \_\_\_\_\_

Total Number of Rooms (Hotels, Motels, Bed and Breakfast) Per Night in Morro Bay: \_\_\_\_\_

Provide a detailed list of expenditures of the allocated funds spent on tourism promotion (attach receipts or invoices for all paid expenditures)

|                |          |
|----------------|----------|
| _____          | \$ _____ |
| _____          | \$ _____ |
| _____          | \$ _____ |
| _____          | \$ _____ |
| TOTAL \$ _____ |          |

Describe in detail the marketing and promotion methods that were used to attract visitors from 50 miles or more from Morro Bay. Please attach samples of rack cards, advertisements etc.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please list any surveys, registration information, contest information, data base or follow-up that was conducted with attendees in regard to the event. Please attach any survey data or any supporting information gathered.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I certify that the MBTBID funds received were used solely for tourism lodging promotion as defined by the MBTBID Mission Statement.

Applicant Signature: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

**Within 60 days following your event, mail or deliver this Post Event form to:**

**Morro Bay Tourism Business Improvement District (MBTBID)**

**City Clerk's Office, City of Morro Bay**

**595 Harbor Street**

**Morro Bay, CA 93442**

**Page 4 of 5**

## **Morro Bay Tourism Business Improvement District (MBTBID)**

### **Funding Request Information**

The Morro Bay Tourism Improvement District (MBTBID) receives funds from a self-imposed assessment upon Hotels, Motels and Bed and Breakfast units located inside the City limits of Morro Bay. The MBTBID has budgeted some of those funds to be distributed for a narrow range of events and activities permitted by state law. The MBTBID accepts applications for use of those funds. To be considered for funding, applications must meet the following criteria based upon Morro Bay City Council, Resolution No. 08-09:

Section 5. The City Council hereby declares that the types of improvements and activities funded by the annual assessments on lodging businesses within the MBTBID are tourism promotions and marketing programs to promote Morro Bay as a tourism destination and projects, programs, and activities that benefit LODGING businesses located and operating within the boundaries of the district. The proposed improvements and activities **shall be targeted at increasing transient stays.**

**The Morro Bay Tourism Business Improvement District (MBTBID) requests those proposals comply with the following criteria:**

1. MBTBID funds should be directed to the events that generate the maximum economic benefit.
2. MBTBID will favor providing “seed” money to new events as opposed to funding established, recurring events and encourages all events and organizations to become self-sustaining.
3. The MBTBID Board desires to establish Morro Bay as a tourism leader for purposes of business, pleasure, recreation, education, arts, heritage and culture.

**The MBTBID will review applications and make decisions for funding based by placing emphasis on the following when evaluating each application:**

1. How many room nights will the event/activity generate?
2. Does the activity/event promote Morro Bay outside the SLO County/Central Coast area?
3. How many out of town participants are estimated?
4. How reliable is the information provided by the organization?